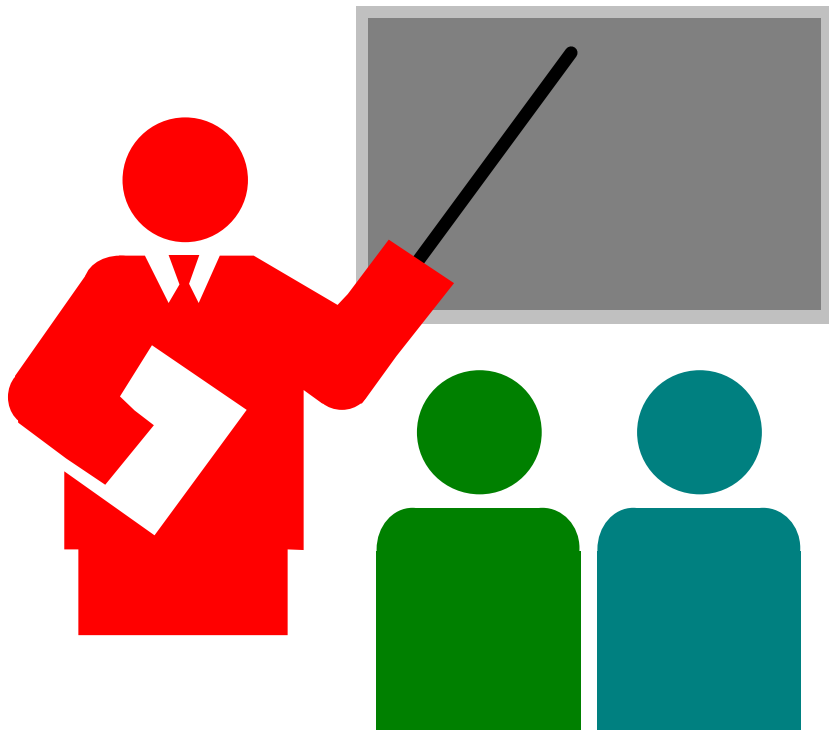


**CONTRACT MANAGEMENT PLAN  
FOR TRAINING AND PERFORMANCE  
DEVELOPMENT SUPPORT (TPD)**



**INTERNAL REVENUE SERVICE  
ASSISTANT COMMISSIONER (PROCUREMENT)  
OFFICE OF CONTRACT ADMINISTRATION  
COMMUNICATIONS AND SUPPORT  
ADMINISTRATION BRANCH M:P:C:C**

# Table of Contents

## Section 1 - Introduction

Overview of Guide for Ordering .....	1-1
Contract Overview.....	1-1
Contract Scope.....	1-1
Available Products and Services.....	1-2

## Section 2 - Contractor Information

Contractor Name and Address .....	2-1
Project Manager.....	2-1
Contract Manager.....	2-1
Contract Number.....	2-1
Contract Establishment Code.....	2-1
Tax Identification Number.....	2-1
Type of Business.....	2-1

## Section 3 - Contract Administration Information

Contract Administration Office.....	3-1
Administrative Contracting Officer.....	3-1
Chief, Support and Administration Section .....	3-1
Chief, Communication and Support Administration Branch.....	3-1

## Section 4 - Program (technical) Administration Information

IRS Corporate Education Schools.....	4-1
Contracting Officer's Technical Representative (COTR).....	4-1
Government Task Manager.....	4-1
Project Management.....	4-2

## Section 5 - Information on Ordering

Task Order Procedures.....	5-1
Task Proposals.....	5-5
Proposed Task Orders.....	5-6
Revised Task Orders.....	5-8
Cancellation of Task Orders.....	5-8
Closeout Procedures.....	5-8

## Section 6 - Appendices

Glossary of Terms.....	6-1
------------------------	-----

### Forms

Optional Form 347.....	7-1
Contractor Performance Report.....	7-3
Release of Claims.....	7-6

**SECTION 1**  
**INTRODUCTION**

## 1. INTRODUCTION

### a. **Overview of Guide for Ordering**

The purpose of this document is to provide guidance and assistance to all Contracting Offices and Technical Personnel for placing orders for services that can be acquired from these contracts.

This document is to be used in conjunction with the contracts. It cannot be used in lieu of the contracts, as it does not contain all of the contracts terms and conditions necessary for issuing and administering task orders, nor does it contain item descriptions or pricing information.

### b. **Contractual Information**

(1) There have been 15 awards for products and services related to training and performance support for improvement of IRS organizational performance. See Section 2 for individual contractor information.

(2) Type of Contracts: Indefinite Delivery-Indefinite Quantity

(3) Users: Internal Revenue Service National and Regional Offices

(4) Term of Each Contract:

(a) Base year (from date of award thru 12 months thereafter) with options to extend for four (4) additional one-year periods.

### c. **Contract Scope**

The Internal Revenue Service (IRS) Corporate Education is contracting for products and services related to training and performance support for improvement of IRS organizational performance.

Products and services available under the contract:

- a) SERVICE AREA 1 - RESEARCH, ANALYSIS AND EVALUATION OF TRAINING STRATEGIES
- b) SERVICE AREA 2 - PERSONNEL ASSESSMENTS
- c) SERVICE AREA 3 - CREATION OF SPECIFIC COURSES, CURRICULA, AND PERFORMANCE DEVELOPMENT MATERIAL
- d) SERVICE AREA 4 - COUNSELING SUPPORT FOR PERFORMANCE DEVELOPMENT
- e) SERVICE AREA 5 - ORGANIZATIONAL DEVELOPMENT TRAINING AND CONSULTING
- f) SERVICE ARE 6 - ADMINISTRATIVE SUPPORT

## **SECTION 2**

### **CONTRACTOR INFORMATION**

## CONTRACTOR INFORMATION

a. Service Area 1 - Research, Analysis and Evaluation of Training Strategies

b. Contractor (Name and Address):

**Raytheon Training, Inc.  
13775 McLearen Road  
Herndon, VA 20171**

c. Contract Number: **TIRNO-98-D-00010**

d. Contract Establishment Code: **05-654-6583**

e. Tax Identification Number: **13-2592747**

f. Type of Business: **Large**

g. Program Manager:

**Robert E. Jones, Jr  
13775 McLearen Road  
Herndon, VA 20171  
(703) 787-3931**

**Fax (703) 481-4943**

Contract Manager:

**Judith B. Miller  
13775 McLearen Road  
Herndon, VA 20171  
(703) 787-3918**

**Fax (703) 481-4924**



## CONTRACTOR INFORMATION

a. Service Area 1 - Research, Analysis and Evaluation of Training Strategies

b. Contractor (Name and Address):

**Interactive Media, Inc.  
P. O. Box 404, Route 2  
North Stonington CT 06359**

c. Contract Number: **TIRNO-98-D-00011**

d. Contract Establishment Code: **00-483-2015**

e. Tax Identification Number: **25-1096900**

f. Type of Business: **Large**

g. Program Manager:

Contract Manager:

**Kent Jones  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910  
Fax (860) 599-6514**

**Janet Skahill  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910, Ext. 2242  
(860) 599-6514**

## CONTRACTOR INFORMATION

a. Service Area 1 - Research, Analysis and Evaluation of Training Strategies

b. Contractor (Name and Address):

**Science Applications International Corporation  
1710 Goodridge Drive, P. O. Box 1303  
McLean, Virginia 22102**

c. Contract Number: **TIRNO-98-D-00012**

d. Contract Establishment Code: **05-478-1240**

e. Tax Identification Number: **95-3630868**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Cynthia Hillman  
1710 Goodridge Drive  
P. O. Box 1303  
McLean, VA 22102  
(703) 394-5531**

**Fax (703) 448-1925**

**June Pilar  
1710 Goodridge Drive  
P.O. Box 1303  
McLean, VA 22102  
(703) 556-7175  
(703) 448-1925**

## CONTRACTOR INFORMATION

a. Service Area 1 - Research, Analysis and Evaluation of Training Strategies

b. Contractor (Name and Address):

**Computer Science Corporation  
304 West Route 38, Box N.  
P.O. Box 1038  
Moorestown NJ 08057-0902**

c. Contract Number: **TIRNO-98-D-00013**

d. Contract Establishment Code: **03-679-0160**

e. Tax Identification Number: **95-2043126**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Dr. William Stembler  
525 Butler Farm Road  
Suite 106  
Hampton, VA 22206  
(757) 865-7700  
Fax (757) 865-8225**

**Jack Abadie  
1 Flint Hill (OFH)  
10530 Rosehaven Street.  
Fairfax, Virginia 22030  
(703) 279-3588  
(703) 279-3505**

## CONTRACTOR INFORMATION

a. Service Area 2 - Personnel Assessments

b. Contractor (Name and Address):

**Interactive Media, Inc.  
P. O. Box 404, Route 2  
North Stonington CT 06359**

c. Contract Number: **TIRNO-98-D-00011**

d. Contract Establishment Code: **00-483-2015**

e. Tax Identification Number: **25-1096900**

f. Type of Business: **Large**

g. Program Manager:

Contract Manager:

**Kent Jones  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910  
Fax (860) 599-6514**

**Janet Skahill  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910, Ext. 2242  
(860) 599-6514**

## CONTRACTOR INFORMATION

a. Service Area 2 - Personnel Assessments

b. Contractor (Name and Address):

**Science Applications International Corporation  
1710 Goodridge Drive, P. O. Box 1303  
McLean, Virginia 22102**

c. Contract Number: **TIRNO-98-D-00012**

d. Contract Establishment Code: **05-478-1240**

e. Tax Identification Number: **95-3630868**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Cynthia Hillman  
1710 Goodridge Drive  
P. O. Box 1303  
McLean, VA 22102  
(703) 394-5531**

**Fax (703) 448-1925**

**June Pilar  
1710 Goodridge Drive  
P.O. Box 1303  
McLean, VA 22102  
(703) 556-7175  
(703) 448-1925**

## CONTRACTOR INFORMATION

a. Service Area 2 - Personnel Assessments

b. Contractor (Name and Address):

**National Computer Systems/London House  
4301 Wilson Boulevard, Suite 200  
Arlington, Virginia 22201**

c. Contract Number: **TIRNO-98-D-00014**

d. Contract Establishment Code: **04-385-6723**

e. Tax Identification Number: **41-0850527**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Greg A. Farrell  
4301 Wilson Boulevard, Suite 200  
Arlington, Virginia 22203  
(703) 284-5613**

**Fax (703) 284-5628**

**Same as Program Mgr.**

## CONTRACTOR INFORMATION

a. Service Area 2 - Personnel Assessments

b. Contractor (Name and Address):

**HUMRRO Incorporated  
66 Canal Center Plaza, Suite 400  
Alexandria, Virginia 22314-1591**

c. Contract Number: **TIRNO-98-D-00015**

d. Contract Establishment Code: **12-154-7004**

e. Tax Identification Number: **23-7029310**

f. Type of Business: **Not-for-Profit**

g. Program Manager:

Contract Manager:

**Dr. William Strickland  
66 Canal Center Plaza  
Suite 400  
Alexandria, Virginia 22314-1591  
(703) 549-3611**

**Fax (703) 548-5574**

**Judy Pumphrey  
66 Canal Center Plaza  
Suite 400  
Alexandria, Virginia 22314  
(703) 706-5602  
(703) 549-9025**

## CONTRACTOR INFORMATION

a. Service Area 3 - Creation of Specific Courses, Curriculum and Performance Development Materials

b. Contractor (Name and Address):

**Interactive Media, Inc.  
P. O. Box 404, Route 2  
North Stonington CT 06359**

c. Contract Number: **TIRNO-98-D-00011**

d. Contract Establishment Code: **00-483-2015**

e. Tax Identification Number: **25-1096900**

f. Type of Business: **Large**

g. Program Manager:

Contract Manager:

**Kent Jones  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910  
Fax (860) 599-6514**

**Janet Skahill  
P.O. Box 404, Route 2  
North Stonington CT 06359  
(860) 599-3910, Ext. 2242  
(860) 599-6514**



## CONTRACTOR INFORMATION

a. Service Area 3 - Creation of Specific Courses, Curriculum and Performance Development Materials

b. Contractor (Name and Address):

**Science Applications International Corporation  
1710 Goodridge Drive, P. O. Box 1303  
McLean, Virginia 22102**

c. Contract Number: **TIRNO-98-D-00012**

d. Contract Establishment Code: **05-478-1240**

e. Tax Identification Number: **95-3630868**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Cynthia Hillman  
1710 Goodridge Drive  
P. O. Box 1303  
McLean, VA 22102  
(703) 394-5531**

**Fax (703) 448-1925**

**June Pilar  
1710 Goodridge Drive  
P.O. Box 1303  
McLean, VA 22102  
(703) 556-7175  
(703) 448-1925**

## CONTRACTOR INFORMATION

a. Service Area 3 - Creation of Specific Courses, Curriculum and Performance Development Materials

b. Contractor (Name and Address):

**Computer Science Corporation  
304 West Route 38, Box N.  
P.O. Box 1038  
Moorestown NJ 08057-0902**

c. Contract Number: **TIRNO-98-D-00013**

d. Contract Establishment Code: **03-679-0160**

e. Tax Identification Number: **95-2043126**

f. Type of Business: **Small**

g. Geographic Coverage: **All**

h. Program Manager:

Contract Manager:

**Dr. William Stembler  
525 Butler Farm Road  
Suite 106  
Hampton, VA 22206  
(757) 865-7700  
Fax (757) 865-8225**

**Jack Abadie  
1 Flint Hill (OFH)  
10530 Rosehaven Street.  
Fairfax, Virginia 22030  
(703) 279-3588  
(703) 279-3505**

## CONTRACTOR INFORMATION

a. Service Area 3 - Creating of Specific Courses, Curricula, and Performance Development Materials

b. Contractor (Name and Address):

**Mantech Systems Engineering Corporation  
12015 Lee Jackson Highway  
Fairfax, Virginia 22033-3300**

c. Contract Number: **TIRNO-98-D-00016**

d. Contract Establishment Code: **17-424-5993**

e. Tax Identification Number: **52-1396237**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Mr. Kevin Duffer  
5904 Old Richmond Highway  
Suite 210  
Alexandria, Virginia 22303  
(703) 329-3524**

**Fax (703) 329-3527**

**Erica Wade  
5904 Old Richmond Hwy.  
Suite 210  
Alexandria, Virginia 22303  
(703) 329-3521  
(703) 329-3527**

## CONTRACTOR INFORMATION

a. Service Area 3 - Creating of Specific Courses, Curricula, and Performance Development Materials

b. Contractor (Name and Address):

**Star Mountain, Inc.  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, Virginia 22304**

c. Contract Number: **TIRNO-98-D-00017**

d. Contract Establishment Code: **18-311-3778**

e. Tax Identification Number: **54-1426948**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Tim Schimkus  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, VA 22304  
(703) 960-7000  
Fax (703) 960-7009**

**Susan Ovalle  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, VA 22304  
(703) 960-7000  
(703) 960-7009**

## CONTRACTOR INFORMATION

a. Service Area 4 - Counseling Support for Performance Development

b. Contractor (Name and Address):

**Star Mountain, Inc.  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, Virginia 22304**

c. Contract Number: **TIRNO-98-D-00017**

d. Contract Establishment Code: **18-311-3778**

e. Tax Identification Number: **54-1426948**

f. Type of Business: **Small**

h. Program Manager:

Contract Manager:

**Tim Schimkus  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, VA 22304  
(703) 960-7000  
Fax (703) 960-7009**

**Susan Ovalle  
3601 Eisenhower Avenue  
Suite 450  
Alexandria, VA 22304  
(703) 960-7000  
(703) 960-7009**

## CONTRACTOR INFORMATION

a. Service Area 4 - Counseling Support for Performance Development

b. Contractor (Name and Address):

**Vantage Human Resources Services, Inc.  
2300 Clarendon Boulevard  
Suite 1109  
Arlington, Virginia 22201**

c. Contract Number: **TIRNO-98-D-00018**

d. Contract Establishment Code: **07-265-4999**

e. Tax Identification Number: **54-0969656**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Jeanne C. Campbell  
2300 Clarendon Blvd., Suite 1109  
Arlington, Virginia 22201  
(703) 247-4100**

**N/A**

**Fax (703) 247-4102**

## CONTRACTOR INFORMATION

a. Service Area 5 - Organizational Development Training and Consulting

b. Contractor (Name and Address):

**Computer Science Corporation  
304 West Route 38, Box N.  
P.O. Box 1038  
Moorestown NJ 08057-0902**

c. Contract Number: **TIRNO-98-D-00013**

d. Contract Establishment Code: **03-679-0160**

e. Tax Identification Number: **95-2043126**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Dr. William Stembler  
525 Butler Farm Road  
Suite 106  
Hampton, VA 22206  
(757) 865-7700  
Fax (757) 865-8225**

**Jack Abadie  
1 Flint Hill (OFH)  
10530 Rosehaven Street  
Fairfax, Virginia 22030  
(703) 279-3588  
(703) 279-3505**

## CONTRACTOR INFORMATION

a. Service Area 5 - Organizational Development Training and Consulting

b. Contractor (Name and Address):

**Johnson & Johnson Associates, Inc.  
3970 Chain Bridge Road  
Fairfax, Virginia 22030**

c. Contract Number: **TIRNO-98-D-00019**

d. Contract Establishment Code: **78-374-5375**

e. Tax Identification Number: **54-1566093**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Wanda Savage-Moore  
3970 Chain Bridge Road  
Fairfax, Virginia 22030  
(703) 359-5969**

**Same as Program Mgr.**

**Fax (703) 359-5971**



## CONTRACTOR INFORMATION

a. Service Area 5 - Organizational Development Training and Consulting

b. Contractor (Name and Address):

**McManis Associates  
1900 K Street, NW., Suite 700  
Washington, DC 20006030**

c. Contract Number: **TIRNO-98-D-00020**

d. Contract Establishment Code: **07-263-7457**

e. Tax Identification Number: **36-3930812**

f. Type of Business: **Large**

g. Program Manager:

Contract Manager:

**Aaron Schulman  
1900 K Street, NW.  
Suite 700  
Washington, DC 20006  
(202) 466-7680**

**Fax (202) 872-1898**

**Maggie Vinsky  
1900 K Street, NW  
Suite 700  
Washington, DC 20006  
(202) 466-7680  
(202) 872-1898**

## CONTRACTOR INFORMATION

a. Service Area 5 - Organizational Development Training and Consulting

b. Contractor (Name and Address):

**Resolution Dynamics Inc  
2001 S Street, NW., Suite 550  
Washington, DC 20009-1125**

c. Contract Number: **TIRNO-98-D-00021**

d. Contract Establishment Code: **19-409-7580**

e. Tax Identification Number: **52-1555879**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**William L. King  
2001 S Street, NW  
Suite 550  
Washington, DC 20009-1125  
(202) 483-7550**

**Same as Program Mgr.**

Fax **(202) 483-7522**

## CONTRACTOR INFORMATION

a. Service Area 5 - Organizational Development Training and Consulting

b. Contractor (Name and Address):

**KPMG Peat Marwick, LLP  
2001 M Street, NW  
Washington, DC 20036**

c. Contract Number: **TIRNO-98-D-00022**

d. Contract Establishment Code: **00-166-7906**

e. Tax Identification Number: **13-5565207**

f. Type of Business: **Large**

g. Program Manager:

Contract Manager:

**Richard J. Roberts  
2001 M Street, NW  
Washington, DC 20036  
(202) 467-3039**

**Same as Program Mgr.**

**Fax (202) 293-5437**

## CONTRACTOR INFORMATION

a. Service Area 6 - Administrative Support

b. Contractor (Name and Address):

**AB Technologies, Inc.  
1600 N. Beauregard Street  
Suite 300  
Alexandria, Virginia 22311-1720**

c. Contract Number: **TIRNO-98-D-00023**

d. Contract Establishment Code: **83-566-1729**

e. Tax Identification Number: **54-1675446**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Henry B. Gass  
1600 N. Beauregard Street  
Suite 300  
Alexandria, Virginia 22311  
(703) 998-1603**

**Fax (703) 998-1648**

**Catherine DiRienzo  
1600 N. Beauregard Street  
Suite 300  
Alexandria, Virginia 22311  
(703) 998-1607  
(703) 998-1648**

## CONTRACTOR INFORMATION

a. Service Area 6 - Administrative Support

b. Contractor (Name and Address):

**Federal Consulting Services, Inc.  
8229 Boone Boulevard  
Suite 360  
Vienna, Virginia 22182**

c. Contract Number: **TIRNO-98-D-00024**

d. Contract Establishment Code: **80-168-9134**

e. Tax Identification Number: **54-1654898**

f. Type of Business: **Small**

g. Program Manager:

Contract Manager:

**Ed Heironimus  
8229 Boone Boulevard  
Suite 360  
Vienna, Virginia 22182  
(703) 827-7080**

**Fax (703) 827-7085**

**Sherry Miller  
8229 Boone Boulevard  
Suite 360  
Vienna, Virginia 22182  
(703) 827-7080  
(703) 827-7085**

## **SECTION 3**

### **CONTRACT ADMINISTRATION INFORMATION**

## CONTRACT ADMINISTRATION INFORMATION

a. Contract Administration Office:

Internal Revenue Service  
A/C Procurement, M:P:C:C  
Communications and Support Branch  
6009 Oxon Hill Road, Room 700  
Oxon Hill, Maryland 20745

b. Administrative Contracting Officer:

Debra M. Jacobs

c. Telephone Number/Fax Number/E-Mail

(202) 283-1295  
(202) 283-1519  
debra.jacobs@ccgate.hq.irs.gov

d. Chief, Support Administration Section\*

Shirley A. Johnson  
(202) 283-1247 - Voice  
(202) 283-1519 - Fax  
shirley.johnson@ccgate.hq.irs.gov

e. Chief, Communications and Support Administration Branch\*

Delores M. Chambers-Dupuy  
(202) 283-1153 - Voice  
(202) 283-1519 - Fax  
delores.chambers@ccgate.hq.irs.gov

\*Contact only if Administrative Contracting Officer is unavailable.

f. Task Orders and Modification Distribution:

Upon issuance of any task order or modification by the Regional Contracting Officers, normal distribution will apply, with the inclusion of one copy to the Administrative Contracting Officer

	<u>Number of Copies</u>
Administrative Contracting Officer	1
Contractor	1
File Copy	1
Contracting Officer's Technical Representative (COTR)	1
Government Task Managers (GTM's)	1



## **SECTION 4**

### **PROGRAM (TECHNICAL) ADMINISTRATION INFORMATION**

#### **4. PROGRAM (TECHNICAL) ADMINISTRATION INFORMATION**

##### **A. IRS Corporate Education consists of:**

###### **(1) The School of Taxation**

Provides training and performance support on tax law, regulation, policies and procedures for processing and examining tax returns, collecting taxes and providing customer (i.e. taxpayer) service.

###### **(2) The School of Information Technology**

Responsible for developing curricula to provide the technical skills and knowledge for all Information Systems (IS) professionals; for teaching technical skills for submission processing activities; and for providing computer literacy programs for all employees.

###### **(3) The School of Professional Development**

Responsible for training and professional development of Internal Revenue Service managers.

##### **B. Contracting Officer's Technical Representative (COTR)**

The COTR represents the Contracting Officer in technical matters pertaining to the contract. The COTR can be reached as follows:

Mr. George Westry  
IRS Corporate Education  
Crystal Plaza 6  
2211 S. Clark Street, 2nd Floor  
Arlington, Virginia 22202  
Voice: (703) 308-6039, Fax: (703) 308-6543  
E-mail: [george.westry@ccmail.irs.gov](mailto:george.westry@ccmail.irs.gov)

The COTR's duties and responsibilities are outlined in the Treasury COTR Handbook (TD P 76 - 01 .D) and the IRS Contract Administration Guidelines. The COTR's limitations are also addressed in the COTR designation letter, which will be provided along with a signed copy of the contract.

##### **C. Government Task Manager (GTM)**

The GTM will be the COTR's on-site representative and will be identified in each Task Order. The COTR may delegate the following responsibilities to the GTM:

- (1) Developing the technical requirements for task proposal request.
- (2) Evaluating Contractor submitted Task Proposals for level of effort.
- (3) Providing technical direction during the performance of a given task order issued under the contract.
- (4) Monitoring the Contractor's performance on a given task order issued under the contract.
- (5) Inspecting all task order deliverables.
- (6) Conducting periodic reviews of work and services performed by the Contractor to ensure compliance with the contract and task order terms and conditions.
- (7) Advising the Contracting Officer of any factors which may cause a delay in the performance of work.

**The GTM or COTR shall not provide any supervision or instructional assistance to the Contractor's personnel.**

## **PROJECT MANAGEMENT**

To promote timely and effective administration, correspondence (except for invoices submitted under the contract) shall be subject to the following procedures as outlined in Section G of the contract:

- (1) Technical correspondence (where technical issues relating to compliance with task order specifications are involved) shall be addressed to the COTR and/or the GTM (as applicable) with an informational copy of the correspondence to the Procuring Contracting Officer.
- (2) Contractual correspondence (that which proposes or otherwise involves waivers, deviations or modifications to the requirements, terms or conditions of the task order) shall be addressed to the Procuring Contracting Officer.
- (3) Correspondence that involves clarifications, waivers, deviations or modifications to the terms and conditions of the base contract shall be addressed to the Administrative Contracting Officer.

- (3) Copies of Contractor Performance Reports, Invoices and Vouchers associated with regionally procured task orders shall be sent to the Administrative Contracting Officer.

**SECTION 5**  
**INFORMATION ON ORDERING**

## **TASK ORDER PROCEDURES**

This section will be used as a step-by-step guide for issuing task orders. Every effort will be made to ensure fair and impartial task assignments. The Contracting Officer's Technical Representative (COTR) or Government Task Manager (GTM) is responsible for the following:

I. After the requirement has been identified, the COTR or GTM shall prepare a Statement of Work consisting of, as a minimum, the following information:

A. Introduction

1. Purpose
2. Requesting Organization

B. Statement of Work

1. The nature of the work
2. Place and period of performance
3. Reporting Requirements
4. Meetings and Travel
5. Deliverables and Schedule

II. Upon completion of the statement of work, the designated representative from Corporate Education shall send a complete Task Request package to the procuring Contracting Officer to issue the Task Proposal Request(s) to the contractor(s). A complete package shall consist of, but is not limited to:

1. Statement of Work;
2. Requisition (Funding document(s));
3. Independent Government Estimate (IGE);
4. Service Area Recommendation; and,
5. Statement justifying choosing a specific contractor

III. Upon receipt of the complete Task Request package, the Contracting Officer is responsible for the following:

A. Identify the Characteristics of the Work

Validate the requirement as within the scope of the Training and Professional Development (TPD) contracts. Validate the requested Service Area as appropriate according to Section C of the contracts.

B. If a specific contractor is requested by the User:

1. This can only be used under the following circumstances:
  - a. Considering more than one contractor would result in unacceptable delay given the urgency of the requirement; or,
  - b. Only one contractor can provide services of the required quality given the unique or highly specialized nature of the requirement; to be used only when selectee is obvious and competitive procedures will not assist in appropriate selection -- use of this justification requires approval one level above the Contracting Officer); or,
  - c. A sole-source order is in the interest of economy and efficiency as a logical follow-on to an order or contract already issued (see note below); or
  - d. An order must be placed with the contractor to satisfy a minimum guarantee.

NOTE: A follow-on task is one that clearly continues a project undertaken on some prior contract or task order, either under the TPD contracts or some other contract vehicle. A prime contractor can be chosen on the basis of a subcontractor's prior work; however, this only makes sense if under the contemplated order the subcontractor will provide a major portion of the work.

Also, a follow-on selection is not appropriate if anticipated requirements encompass efforts far beyond the scope or magnitude of the prior work. There is no commitment on the part of the government that work will be continued using this authority. The user must document in the Task Placement Request what prior work is to be continued and how/why it fits this criteria.

### C. Identify Eligible Vendor(s)

This is to be used when a contractor has not been identified and selection will be made through competitive procedures:

If more than one contractor is eligible, perform a review to determine if there is any serious issues or problems related to past performance, workload capacity, quality, or conflict of interest. If a problem exists with any contractor, that firm will be eliminated from consideration until the problem is resolved. Then, a determination will be made as to the most appropriate competitive selection methodology among those specified below. A recommendation should be made by the technical adviser, but the final decision will be that of the Contracting Officer. Normally, only one method is applicable to a given task order. However, it is possible that a technical competition will follow the RFI procedure.

### D. Determine the Most Appropriate Competitive Selection Methodology

#### 1. The following guidance applies:

a. Performance-based selection: Should neither of the techniques described below under (b) or (c) apply, the work will be considered appropriate for any contractor in the applicable Service Area. The selectee will be the contractor with the least business relative to a model distribution of work that is proportionate to performance scores. The term "least business" means work already assigned whether or not awarded, assumes full funding, and excludes the value of options. This is the preferred selection method.

b. Request for Information (RFI): An RFI selection method is appropriate if the work to be undertaken requires skills and/or technology that may not be commonly available among the TPD contractors in the selected Service Area. In these cases, the required skills and/or technologies will be identified by the technical adviser, and an RFI will be sent to eligible contractors outlining the special needs. It will include any required experience level or other details that will be considered to determine eligibility so that contractors can clearly understand whether to participate and how responses will be evaluated. All evaluation criteria will be considered critical to scoring an overall passing score.

Responses will be evaluated on a pass/fail basis. In cases where more than one contractor receives a passing score, the selected contractor will normally be decided using the performance-based methodology outlined above under (a). Should further information be deemed necessary to making an appropriate selection, a technical competition can be conducted (see below).



c. Technical competition: A technical competition can be conducted if it is determined necessary to choose between competing technical approaches or if more information than that obtained through the issuance of an RFI is necessary to determine qualifications. It is considered that this process will be rarely used under TPD. The normal TPD projects do not involve research and development effort, innovative or unprecedented processes, or technical approaches that are beyond the state of the art. It is not appropriate to evaluate cost, management skills or other factors that were evaluated for contract award on a "best value" basis and are a part of the performance evaluation system. It may be more commonly used when the RFI process does not result in identifying a fully qualified contractor.

A technical competition will be an expedited process. Written technical proposals will be discouraged. It will normally involve customer identification of appropriate evaluation factors that will be identified to appropriate contractors and considered during the conduct of an oral presentation. The appropriate contractors will be invited to participate and given at least seven days notice, if possible. This is the least preferred selection methodology.

NOTE: If a technical competition is conducted, the contractor will not be directly reimbursed for the cost of the competitive proposal and/or oral presentation. Responses are not contractually required.

d. Rotational-based selection: If none of the above mentioned selection methodologies is appropriate, the Contracting Officer may choose to rotate the selections among the contractors in a specific service area. The first round of selections shall be made at random using some form of lottery (names in a hat, etc). This will establish the order of selection. The remaining rounds shall utilize the established order of selection.

NO ELIGIBLE CONTRACTOR. The above procedures are designed as a sequence of steps to be followed only to the point where a selection is made. It is always possible that the process will result in no selection if all otherwise eligible contractors are eliminated at some point in the process. In that event, the field will be widened to include all TPD contractors. If after evaluating all TPD contractors and there is no eligible contractor, the end user can seek a contractor from external sources.

**Contractors may refuse task assignments in task areas outside those originally awarded with no negative consequences.**

IV. After a method of selection determination has been made, the Contracting Officer shall transmit to the Contractor(s), a Task Proposal Request which includes the following, as appropriate:

1. Scope of work, meetings, travel and deliverables;
2. Reporting requirements;
3. Period and place of performance,
4. Recommended order type (firm fixed price or time and materials)
5. Applicable special provisions.

The Task Request will be forwarded to the applicable Contractor(s) under dated signature of the Contracting Officer as a request for proposal.

### **TASK PROPOSALS**

V. The Contractor shall respond to the Contracting Officer, within five (5) working days (time frame can be adjusted to fit the circumstances) of the issuance of a Task Request, with a written proposal that provides the following technical and cost information, as appropriate:

#### **1. Technical Proposal**

Technical Proposals submitted in response to Task Proposal Requests shall be completion-type and shall adhere to the following format:

##### **1.0 Introduction**

###### **1.1 Purpose**

###### **1.2 Organization**

##### **2.0 Technical Plan**

###### **2.1 Sub-Task 1 (Title)**

###### **2.1.1 Scope of Work**

###### **2.1.2 Approach**

###### **2.1.3 Assumptions**

###### **2.1.4 Description of Sub-Task and Deliverables**

###### **2.1.5 Schedule (Delivery schedule or period of performance)**

###### **2.2 Sub-Task 2 (Repeat format for all sub-tasks)**

### 3.0 Staffing and Pricing Plan

#### 3.1 Sub-Task 1 (Title)

3.1.1 Personnel Requirements

3.1.2 Skill Category Mix (Rationale for Proposed Personnel)

3.1.3 Resumes (See (b) below for the required Resume format)

3.1.4 Miscellaneous (including other direct items and travel as appropriate)

#### 3.2 Sub-Task 2 (Repeat format for all sub-tasks)

##### (b) Resume Format

Resumes shall contain the following information and be no more than two pages in length. Items 6 and 7 may be submitted on a separate page.

- (1) full name;
- (2) the skill category for which the individual is proposed;
- (3) education;
- (4) chronological work experience up to ten years (including the name and phone number of all immediate supervisors);
- (5) a brief narrative relating work experience as described in (4) above to the minimum requirements of Section J;
- (6) a dated and signed statement by the individual certifying that the information on the resume is true and accurate; and
- (7) a dated and signed statement of an official of the company certifying that the information contained in the resume is true and accurate to the best of his/her knowledge.

VI. If negotiations are required, the Contracting Officer will arrange a meeting between the appropriate personnel. Within five (5) working days after the conclusion of negotiations, the Contractor shall provide a revised Task Proposal reflecting the results of the negotiations. This revised Task Proposal will form the basis upon which a bi-lateral Task Order will be issued under signature of the Contracting Officer. Each Task Order shall be subject to the terms and conditions of the contract. The order will be given to the contractor whose proposal offers the greatest value to the Government, price and technical factors considered.

## PROPOSED TASK ORDERS

VII. Before issuance of any Task Order, the IRS Regional Contracting Officer shall obtain a **VERIFICATION NUMBER** from the Administrative Contracting Officer at the National Office, M:P:C:C:B. This verification number will authorize the issuing office to place a Task Order against the contract. This number is not the same as the Task Order number issued by each Contracting Office. The verification number will appear on the face page of the Task Order on the top line where the supplies and/or services are specified or in the description block of any subsequent Task Order modification.

**The Contractor shall not accept any Task Order(s) without a verification number. Any Task Order(s) processed without a verification number will be made at the risk of the Contractor.** The Contractor shall reference any assigned verification number in reports when reporting work in progress under the Task Orders.

NOTE: The purpose of the verification numbers is to keep control of the amount of work, expenditures and minimum obligations on each contract. It is also for the purpose of monthly reports that are to be prepared. The Administrative Contracting Officer will not use the verification number system to instruct the Regional Contracting Officers on whether or not they can issue a particular order.

VIII. The Contractor shall perform all work described in orders issued by the Contracting Officer. Orders shall include the following:

1. Task Orders, which include:
  - a. Scope of Work, meetings, travel and deliverables;
  - b. Reporting requirements;
  - c. Period of performance;
  - d. Key personnel;
  - e. Applicable special provisions; and
2. Total price to perform the task order (or estimated price, in the event of a time and materials order).
3. Task Orders under this contract shall be issued by the warranted Contracting Officers of each Regional Office or National Office set forth in the contract. All Task Orders shall be placed in writing.
4. All Task Orders issued under the contract shall be in accordance with the rates set forth in the contract, or any contract modifications thereto.
5. A Task Order may be issued without negotiations based on the acceptability of the Task Proposal.

6. Upon execution by the Contracting Officer, the Task Order shall be considered a fully executed document ready for implementation, and forwarded to the Contractor.

### **REVISED TASK ORDERS**

IX. After a Task Order has been issued, it may be necessary to revise the established level of effort among the accepted labor categories of the Task Order. The Contractor may re-direct the level of effort to more accurately reflect the effort required to accomplish the Task. The adjustment of the level of effort shall not exceed the total price for the direct labor of the task order, not to include Other Direct Cost (ODCs). These changes shall be reported, in writing, to the COTR or GTM and the Contracting Officer.

### **CANCELLATION OF TASK ORDERS**

X. The Government may cancel any Task Order upon written notification to the Contractor from the Contracting Officer. Written notification shall be given to the contractor within three (3) days of determining the need for cancellation. Upon cancellation, the Contractor shall deliver to the Government all documents, specifications, plans and materials produced or provided to the Contractor as of the date of the cancellation, as well as documentation for all products designed or developed by the Contractor for the contract. The Government and the Contractor shall negotiate a final settlement of any costs incurred by the Contractor up to and including the date of the cancellation.

### **CLOSEOUT PROCEDURES**

XI. Upon completion of a task order, the Contracting Officer shall ensure that all deliverables have been received and accepted, all invoices have been paid and any remaining funding has been deobligated. The Contracting Officer shall provide a Contractor's Performance Report to the COTR or GTM, as applicable, for completion. Upon completion by the COTR or GTM, the report shall be submitted to the contractor for completion. After the report is fully completed, a copy shall be submitted to the Administrative Contracting Officer. The Contracting Officer shall provide a Release of Claims, Form 9398, to the contractor for completion.

**SECTION 6**

**GLOSSARY OF TERMS**

## **GLOSSARY OF TERMS**

Indefinite Delivery-Indefinite Quantity (IDIQ)- a type of contract used when delivery schedules and quantities are unknown

Task Order - contract vehicle used to procure services against an IDIQ contract

Modification - a change to the original requirement

Contracting Officer (CO) - a person with the authority to enter into, administer, and/or terminate contracts and make related determinations and findings

Contracting Officer's Technical Representative (COTR) - represents the Contracting Officer in technical matters pertaining to the contract

Government Task Manager (GTM) - is the on-site representative of the COTR

Task Request Package - consists of the statement of work, requisition, service area recommendation and any applicable justifications. This is given to the contracting office to begin the task order process

Task Proposal Request - consists of the statement of work, meetings, travel and deliverables, reporting requirements, period and place of performance, order type and applicable special provisions. This is given to the contractor(s) in order for a proposal to be prepared

Verification Number - is a control number issued by the Administrative Contracting Officer for tracking purposes

Other Direct Costs (ODCs) - include travel, meetings, etc., associated with a specific task order

## **SECTION 7 - FORMS**



# ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

**IMPORTANT: Mark all packages and papers with contract and/or order numbers.**

1. DATE OF ORDER		2. CONTRACT NO. (If any)		6. SHIP TO:	
3. ORDER NO.		4. REQUISITION/REFERENCE NO.		a. NAME OF CONSIGNEE	
5. ISSUING OFFICE (Address correspondence to)				b. STREET ADDRESS	
7. TO:				c. CITY	d. STATE e. ZIP CODE
a. NAME OF CONTRACTOR				f. SHIP VIA	
b. COMPANY NAME				8. TYPE OF ORDER	
c. STREET ADDRESS				<input type="checkbox"/> a. PURCHASE <input type="checkbox"/> b. DELIVERY -- Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
d. CITY	e. STATE	f. ZIP CODE		REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
9. ACCOUNTING AND APPROPRIATION DATA				10. REQUISITIONING OFFICE	

11. BUSINESS CLASSIFICATION (Check appropriate box(es))					
<input type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input type="checkbox"/> d. WOMEN-OWNED		
12. F.O.B. POINT		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS	
13. PLACE OF					
a. INSPECTION	b. ACCEPTANCE				

## 17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
SEE BILLING INSTRUCTIONS ON REVERSE	18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.	
	21. MAIL INVOICE TO:					17(h) TOT. (Cont. pages)
	a. NAME					
	b. STREET ADDRESS (or P.O. Box)					17(i) GRAND TOTAL
c. CITY			d. STATE	e. ZIP CODE		

22. UNITED STATES OF AMERICA BY (Signature) 

23. NAME (Typed)

TITLE: CONTRACTING/ORDERING OFFICER

## SUPPLEMENTAL INVOICING INFORMATION

If desired, this order (or a copy thereof) may be used by the Contractor as the Contractor's invoice, instead of a separate invoice, provided the following statement, (signed and dated) is on (or attached to) the order: "Payment is requested in the amount of \$ \_\_\_\_\_. No other invoice will be submitted." However, if the Contractor wishes to submit the invoice, the following information must be provided; contract number (if any), order number, item number(s), description of supplies or service, size, quantities, unit prices and extended totals. Prepaid shipping costs will be indicated as a separate item on the invoice. Where shipping costs exceed \$10 (except for parcel posts), the billing must be supported by a bill of lading or receipt. When several orders are invoiced to an ordering activity during the same billing period, consolidated periodic billings are encouraged.

## RECEIVING REPORT

Quantity in the "Quantity Accepted" column on the face of this order has been: ☐ inspected, ☐ accepted, ☐ received  
by me and conforms to contract. Items listed below have been rejected for the reason indicated.

SHIPMENT NUMBER	PARTIAL		DATE RECEIVED	SIGNATURE OF AUTHROIZED U.S. GOV'T REP.	DATE
	FINAL				
TOTAL CONTAINERS		GROSS WEIGHT	RECEIVED AT	TITLE	

## REPORT OF REJECTIONS

[illegible]

# CONTRACTOR PERFORMANCE REPORT

☐ Final    ☐ Interim-Period Report:                      From \_\_\_\_\_ To \_\_\_\_\_

1. Contractor Name and Address: (Identify Division)	2. Contract Number: _____  3. Contract Value (Base Plus Options): _____  4. Contract Award Date: _____  Contract Completion Date: _____
--	--

5. Type of Contract: (Check all that apply) –

<input type="checkbox"/> CPFF-Completion	<input type="checkbox"/> CPFF-Term	<input type="checkbox"/> CPIF	<input type="checkbox"/> CPAF	<input type="checkbox"/> ID/IQ	<input type="checkbox"/> BOA	<input type="checkbox"/> Labor Hour
<input type="checkbox"/> Requirements	<input type="checkbox"/> T&M	<input type="checkbox"/> SBSA 8(a)	<input type="checkbox"/> Sealed Bid	<input type="checkbox"/> Negotiated		
<input type="checkbox"/> Competitive	<input type="checkbox"/> Non-Competitive					

6. Description of Requirement:

7. Contractor Performance Evaluation. Summarize contractor performance and circle in the column in the center the number which corresponds to the performance rating for each rating category. Please see page three for explanation of rating scale.

Quality of Product or Service	N/A 0 1 2 3 4 +	Supporting Comments/Rationale
Cost Control	N/A 0 1 2 3 4 +	Supporting Comments/Rationale
Timeliness of Performance	N/A 0 1 2 3 4 +	Supporting Comments/Rationale
Business Relations (Procurement)	N/A 0 1 2 3 4 +	Supporting Comments/Rationale
Business Relations (COTR/Program Office)	N/A 0 1 2 3 4 +	Supporting Comments/Rationale
Average Score		(Add the ratings above and divide by number of areas rated).

8. Key Contractor Personnel Evaluation

Project Manager Name _____	Employment Dates _____
Comments/Rating _____	
Other Key Employees: _____	
Name _____ Title _____	Employment Dates _____
Comments/Rating _____	
Name _____ Title _____	Employment Dates _____
Comments/Rating _____	
Name _____ Title _____	Employment Dates _____
Comments/Rating _____	

9. Would you select this firm again? Please explain.

10. COTR/Program Office Name _____	Signature _____
Phone/FAX/Internet Address _____	Date _____

11. Contractor's Review. Were comments, rebuttals, or additional information provided? ☐ No ☐ Yes. Please attach comments.

12. Name of Contractor Reviewer _____	Signature _____
Phone/FAX/Internet Address _____	Date _____

13. Final Review. Were contractor comments reviewed at a level above the contracting Officer? ☐ No ☐ Yes. Please attach comments.

14. Final Ratings Re-assess the Block 7 ratings based on contractor comments and agency review. Revise block 7 rating, if appropriate.

Quality _____	Cost Control _____	Timeliness _____	Business Relations: Procurement _____ COTR/Program Office _____
---------------	--------------------	------------------	---

Final Average Score (Add the ratings above and divide by the number of areas rated) \_\_\_\_\_

15. Contracting Officer Name _____	Signature _____
Phone/FAX/Internet Address _____	Date _____

16. Final Review Official Name _____	Signature _____
Phone/FAX/Internet Address _____	Date _____

### RATING GUIDELINES

Summarize contractor performance in each of the rating areas. Assign each area a rating of N/A (Not Applicable), 0 (Unsatisfactory), 1 (Poor), 2 (Fair), 3 (Good), 4 (Excellent), or ++ (Plus). Use the following instruction in making these evaluations. Ensure that this assessment is consistent with any other Agency assessments made (i.e., for payment of fee purposes).

Rating	Quality of Product/Service	Cost Control	Timeliness of Performance	Business Relations
	<ul style="list-style-type: none"> <li>- Compliance with Contract requirements</li> <li>- Accuracy of reports</li> <li>- Appropriateness of personnel</li> <li>- Technical Excellence</li> </ul>	<ul style="list-style-type: none"> <li>- Within budget (over/under target costs)</li> <li>- Current, accurate, and complete billings</li> <li>- Relationship of negotiated costs to actuals</li> <li>- cost efficiencies</li> </ul>	<ul style="list-style-type: none"> <li>- Met interim milestones</li> <li>- Reliable</li> <li>- Responsive to technical direction</li> <li>- Completed on time, including wrap-up and contract administration</li> <li>- No liquidated damages assessed</li> </ul>	<ul style="list-style-type: none"> <li>- Effective Management</li> <li>- Businesslike correspondence</li> <li>- Responsive to contract requirements</li> <li>- Prompt notification of problems</li> <li>- Reasonable/cooperative</li> <li>- Flexible</li> <li>- Pro-Active</li> <li>- Effective Contractor recommended solutions</li> <li>- Effective small/small disadvantaged business subcontracting program</li> </ul>
0 - Unsatisfactory	Nonconformance are compromising the achievement of contract requirements, despite use of Agency resources	Cost issues are compromising performance of contract requirements.	Delays are compromising the achievement of contract requirements, despite use of Agency resources.	Response to inquiries, technical/ service/administrative issues is not effective and responsive.
1 - Poor	Nonconformances require major Agency resources to ensure achievement of contract requirements.	Cost issues require major Agency resources to ensure achievement of contract requirements.	Delays require major Agency resources to ensure achievement of contract requirements.	Response to inquiries, technical/ service/administrative issues is marginally effective and responsive.
2 - Fair	Nonconformances require minor Agency resources to ensure achievement of contract requirements.	Cost issues require minor Agency resources to ensure achievement of contract requirements.	Delays require minor Agency resources to ensure achievement of contract requirements.	Response to inquiries, technical/ service/administrative issues is somewhat effective and responsive.
3 - Good	Nonconformances do not impact achievement of contract requirements.	Cost issues do not impact achievement of contract requirements.	Delays do not impact achievement of contract requirements.	Response to inquiries, technical/ service/administrative issues is usually effective and responsive.
4 - Excellent	There are no quality problems.	There are no cost issues.	There are no delays.	Response to inquiries, technical/ service/administrative issues is effective and responsive.
++ - Plus	The contractor has demonstrated an exceptional performance level in any of the above four categories that justifies adding a point to the score. It is expected that this rating will be used in those rare circumstances when contractor performance clearly exceeds the performance levels described as "Excellent."			

---

## Part 2. Release of Claims

---

Contract No.

---

Pursuant to the terms of the above numbered contract, but subject to any claims as may be specifically excepted below, the undersigned contractor does release and forever discharge the Government, its Officers, Agents, and Employees, of and from all liabilities, obligations and claims whatsoever in law and in equity under or arising out of said contract.

---

Excepted Claims

---

Contractor

---

By

Title

Date